

# **Program Support and Administration**

## **Programs**

Program Support is an addition to CMS as of version 3.0 and allows for Diocese to use CMS as a platform from which they can connect to external workflows or data collections. It is designed to allow broad diocese level or even unique conference specific plug in data-related workflow to accommodate unique and specific needs. This means CMS can collect information from the client record and, depending on the program in question, potentially additionally collect additional data from the caseworkers or simply push it forward to other roles who will then perform specific functions related to these Special Works-like entities. For example, if a Diocese operates a pharmacy or a mattress program, caseworkers will be able to easily push client information to those programs as a request - allowing individuals tasked with managing those vincentian efforts to perform predefined tasks.

As an illustration, a Diocese might offer a job training program – and this program might be made available to all conferences within a particular part of the city. Caseworkers working with individual whom they assess might benefit from this program can refer them to the program with a couple simple clicks – and the details related to this individual will be forwarded to the program worker responsible for managing the training session. They can then contact the individual, host the training session, and even record the attendance – which will show up in the client record in the future.

More complex programs could involve delivery of mattresses or even managing the federal guidelines related to qualification for EFSP grant dollars (collecting landlord details etc - things that are not currently within the CMS workflow).

This is a plug in architecture which allows Diocese to bring unique and custom scenarios to the table. If they have a grant from the United Way to assist people with particular issues and qualifications, then these processes can be mapped out, new screens built, and these new vincentian functions made available to your local conferences.

In the 3.0 release the primary example of program support is an enhancement and replacement for assigning and tracking Holiday Program efforts.

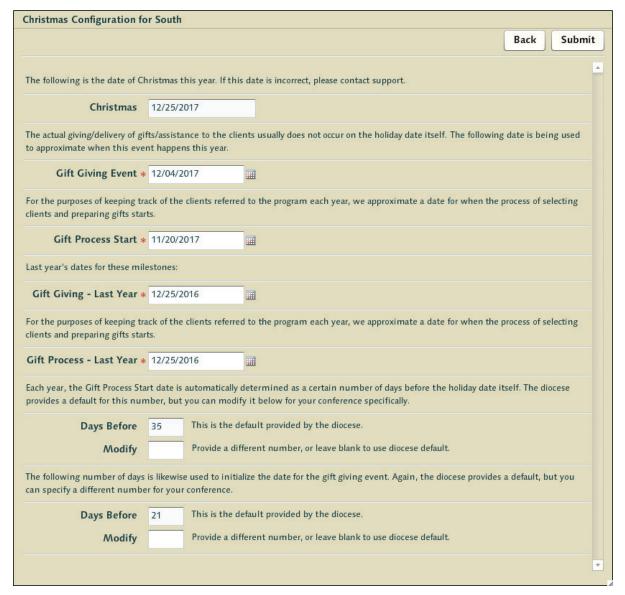
## Referring a Household to the Holiday Program

Caseworkers will simply press the [Vincentian Programs] ad select the Holiday Programs from the Program Grid list. From there they can refer the household to whichever holiday program they wish.

## **Configuring Holiday Programs**

Each conference will conduct their holiday programs differently. Conferences may work with other local groups for Thanksgiving but do their own thing for Christmas. The first step is for conference treasurers to configure the holiday programs for their own conferences.

By opening the Vincentian Programs folder in the task pane, treasurers select the holiday program they wish to configure and press the [Configuration] button.



## Setting the Timing of the Event

These dates and options are inherited from the diocese configuration of the holiday - but conferences have the ability here to adjust them to fit their specific needs. Here we allow conferences to adjust when they deliver the assistance relative to the date of the actual holiday.

The primary goal of this is to capture when referrals that might occur after the conference's annual effort transpires but prior to the actual date of the holiday - so that those referred to the program in that window are not lost next year when the event comes around again.

Gift Giving Event allows a conference to set a specific date for when the event is scheduled to transpire this year. Gift Process Start allows the 'window to open' for when record keeping related to the actual event this year will start. It represents when those who're referred to program for that year will likely end up in lists for folks to collect gifts or food and schedule delivery etc.

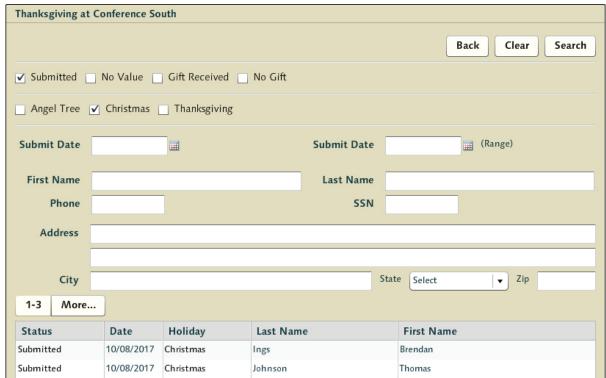
#### Referral Status

Clicking Search will allow the treasurer to search this particular holiday program subtype for individuals based on the status of the referral. There are 4 different statuses related to the referrals to consider.

- Submitted Any referral that comes prior to the end of this year's holiday program window is tagged as 'Submitted'. This is a simple default state for anyone that's been advanced to the holiday event.
- No Value Once the record keeping date starts prior to the holiday event all holiday referrals that have the status 'Submitted' will have their status changed to 'No Value' This is now the list of folks who are, in theory, going to end up getting something for the holiday.
- Gift Received When a treasurer goes down the list and records what assistance was
  provided through the holiday program, the referral status will now switch to 'Gift
  Received'
- No Gift Is used to denote that this household did not receive assistance during the holiday even though they had been on the list. This could be for any number of reasons.

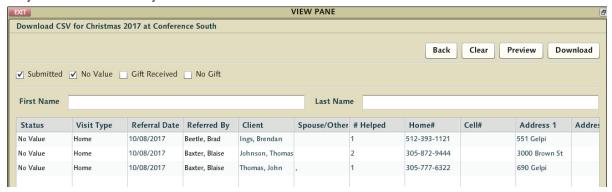
#### Search

This allows the treasurer to manage the list of those referred to the conference program - whether that's for the purpose of eliminating duplicates, editing details, or recording post event assistance that was rendered to the household.



## Generating the List

Once we enter the delivery window for the holiday program in question, as previously stated all the 'Submitted' referrals become 'No Value'. At this point the treasurers will want to generate a list of all those that need to be looked after during the holiday special works so they can receive holiday assistance.

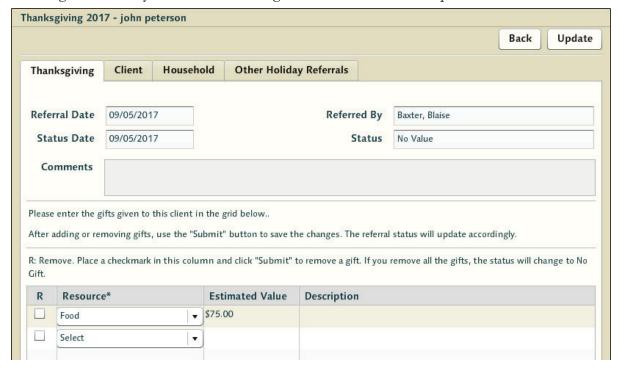


The CSV that is generated by pressing the [Download] button has a long set of details - from phone numbers to address to the details related to the household members (name/age/gender). It also shows which caseworker made the referral. Conferences handle the distribution of who delivers the assistance differently. It might be that one conference will split this CSV up and ask the caseworkers who made the referrals to handle it. It may be divided by area. They may be given to non-vincentian volunteers to handle delivery and get back to you with details of who was helped and to what extent.

But at this point this process has now left CMS. The holiday event transpires - and the various records of what assistance was provided finds its way back to the treasurer.

## Recording the Assistance

The treasurer now can simply work down the list of households that were on this list - selecting them one by one - and recording whatever assistance was provided.



Assistance items are entered individually and each can have their own note - so if a gift card were given out one could record what sort of gift card was involved etc. When finished press the [Update] button. This will alter the status of this holiday referral from 'No Value' to 'Gift Received'.

If the household did not receive assistance during the holiday event but were on the list, pressing [Update] where no assistance is attached will simply change the status of the holiday referral from 'No Value' to 'No Gift'.